

STATE OF WISCONSIN

CIRCUIT COURT

_____ COUNTY

For Official Use

IN THE MATTER OF THE ESTATE OF

☐ GUARDIANSHIP OF☐ CONSERVATORSHIP OF**Petition To Approve**☐ **Transfer to Spouse**☐ **Marital Property Agreement**☐ **Other Transaction**

Case No. _____

Under oath, I state

1. I am the

☐ Guardian of estate☐ Conservator of property☐ 2. The ward is a married person. The name of the ward's spouse is _____.☐ 3. I petition for approval of the exercise by the petitioner of the following right of the ward which the ward could exercise if not under guardianship or conservatorship:☐ Transfer property to spouse☐ Execute Marital Property Agreement☐ Exercise a right in business affairs _____☐ Other transaction _____☐ See attached☐ See attached☐ See attached☐ 4. Property requested to be transferred is described as☐ Interest(s) in real property with legal description:☐ See attached☐ Other assets described as:☐ See attached☐ 5. Factors for court to consider in determining propriety of transfer of property of married ward to spouse or other action contemplated and the likelihood that the ward, as a reasonably prudent person, would take the action contemplated if the ward had the capacity, include:

- The permanency of ward's incapacity and likelihood that ward will need or benefit from property in future,
- Provisions of ward's estate plan,
- Relationship and intimacy between ward and donee and whether donee is likely object of ward's bounty,
- Personal traits and past donative declarations of ward,
- Condition of estate and any adverse effect proposed action will have on estate,
- Impact of proposed action on ward's eligibility for public assistance,
- Likelihood that ward, as reasonably prudent person, would take action contemplated if he or she had capacity to do so.

The action contemplated by guardian will benefit the ward, the ward's estate or members of ward's immediate family as follows:

☐ See attached☐ 6. The ward and the conservator agree to the action contemplated by conservator.

I request the court to approve the action contemplated as stated in this petition.

Name of Attorney	
Address	
Telephone Number	Bar Number

Signature of Petitioner_____
Name Printed or Typed_____
Date